Tax Professional: Client List – Search for Client

The **Client List** page allows you to view and manage your **Client List**. Your list includes clients added through MyFTB, added with a Tax Information Authorization (TIA) form, and those added with a Power of Attorney (POA) Declaration submitted to FTB after October 1, 2014.

You can use the **Search Options** to view different client types, relationship types, or relationship statuses.

For information about other actions related to your **Client List** page, refer to:

- Power of Attorney (POA) – Check POA Status
- Tax Information Authorization (TIA) – Check TIA Status
- Power of Attorney (POA) – Submit Form 3520 (PIT or BE)
- Tax Information Authorization (TIA) – Add TIA Client

To search for POA or TIA clients on your Client List:

- Log in to your MyFTB Tax Professional account.
  - Once you're logged into MyFTB, if you need help with the page you're on, select the question mark icon "?" in the upper right corner of that page.
- View your **Client List**.
  - From your **Tax Professional Overview** page select:
    - **Client List** from your **Main Navigation Menu**, or
    - The **View Client List** link in your **Quick Links** section.
- Follow the steps below.

Steps

Step 1: Enter Your Search Criteria

Note: By default, all active Individual clients display on your **Client List**.

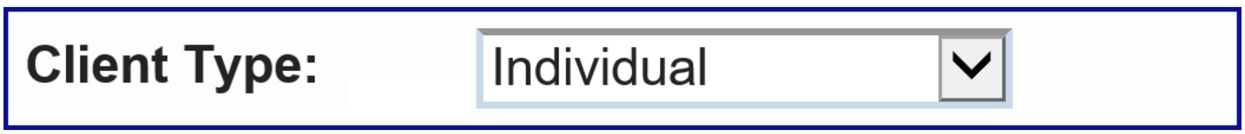
Enter your search criteria in the **Search Options** section of your **Client List** page.

Step 1a:

Select the type of client from the **Client Type** dropdown menu that you want to search for (by default **Individual** is selected):

- **Individual**
- **Business**
- **Fiduciary (Estate or Trust)**
- **540NR Nonresident Group Return**

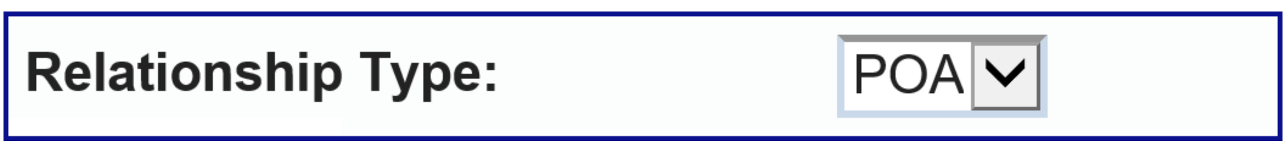
Note: Fiduciary (Estate or Trust) and 540NR Nonresident Group Return client account information is not available online. These clients will display on your **Client List** to allow you to manage your POA and TIA relationships.



Step 1b:

Select the type of relationship from the **Relationship Type** dropdown menu that you want to search by (by default **All** is selected):

- **All**
- **TIA**
- **POA**



Step 1c:

Select the status of the relationship from the **Relationship Status** dropdown menu that you want to search by (by default **Active** is selected):

- **Active**
- **Pending**
- **Inactive**

Note: The status of the POA relationship is based on the status of the POA declaration. For more information about relationship statuses, refer to the Relationship Statuses section of this document.

Step 1d:

Select the **Search** button to view your results.

Step 2: Review Your Search Results

- Review your search results in the **Search Results** section of your **Client List** page.

  Note: To find specific clients, use the filter boxes at the top of each table column. Client's names with pending or inactive statuses **will not display as links in the Name column** on your **Client List**. You must have an active status with your client to access their online account information.

  - For clients with a **Status** of **Active**, select your client's **Name** link in the **Name** column to view their account.
  - To manage the POA or TIA relationship with your client, select the **View Details** link in the **Actions** column for that specific client.

Search Results - Individual Clients

Clear Filter

Last Name	First Name	SSN/ITIN	Relationship Type	Online Access	Expiration Date	Actions
King	Joe	XXX-XX-1111	TIA	Full	04/19/2020	Renew | View Details
Wood	Holly	XXX-XX-2222	POA	Limited	05/16/2021	View Details

Step 3: Unable to Locate Your Client

- If you are unable to locate your client on your **Client List**, change your search criteria and search again, refer to Step 1.
- If you are still unable to locate your client, contact the Tax Practitioner Hotline, 916.845.7057.

Relationship Statuses

There may be more than one status for each **Relationship Status**: Active, Pending, and Inactive.

Relationship Statuses:

- **Active Statuses**:
  - **Active** – You are authorized to access information or represent your client based on the authorizations granted on the POA declaration or TIA request.
- **Pending Statuses** (you are not authorized to request information or represent the client based on a pending relationship):
  - **Pending** – POA declaration or TIA request was submitted through MyFTB or by mail and is being processed by FTB.
  - **Pending Taxpayer Approval** (POA **only**) – POA declaration was submitted through MyFTB without a signed copy of the POA declaration attached. FTB approved the POA declaration and it is pending approval by your client.

    Note: Advise your client they must log in to their MyFTB account and approve the POA declaration (if your client does not have a MyFTB account, advise them to contact FTB, 800.852.5711).
  - **Pending Relationship Verification** – FTB has approved the POA declaration or TIA request and has notified your client to contact us to approve the POA or TIA relationship.

Note: Advise your client they must contact FTB and approve the relationship, 916.845.5525.

- **Inactive Statuses** (you are not authorized to request information or represent the client based on an inactive relationship):
    - **Revoked** – Taxpayer or representative revoked the relationship.
    - **Rejected** – POA declaration or TIA request was deemed incomplete or invalid by FTB during processing.
    - **Expired** –Relationship has passed the expiration date.
    - **Canceled** – Relationship was processed by FTB and was canceled by the taxpayer before it became active.
    - **Revoked Permanent** (TIA **only**) – TIA relationship was permanently revoked by the taxpayer. Taxpayer must contact FTB if they want to have the relationship re-established.